Karin Seymour

Director of Client & Marketing
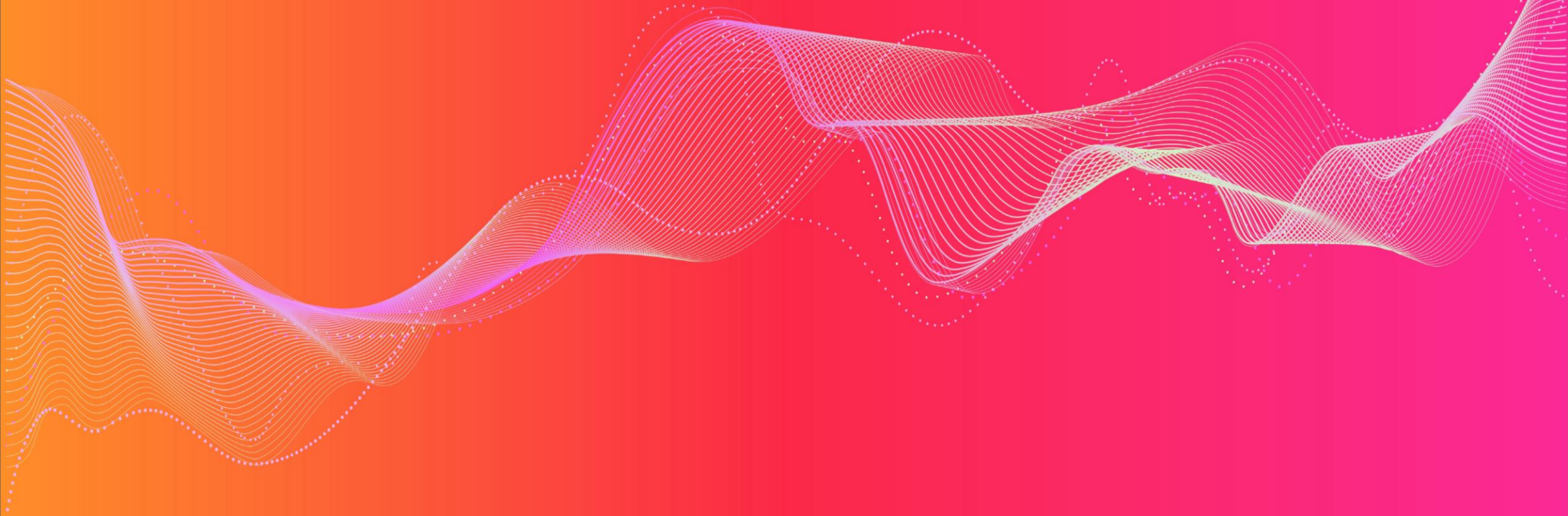
Agenda

1. **Nigel Walley** - *The Data Landscape Today*

2. **Adam Thomas** – *What does Quality Data look like?*

3. **Lucy Bristowe** – *Cross-platform measurement and the future*

4. **Aliya Paracha** – *Innovation in targeting and effectiveness*

5. **Pierre Coppin & Karin Seymour** – *Data in action*

sky

THE DATA LANDSCAPE TODAY

Nigel Walley
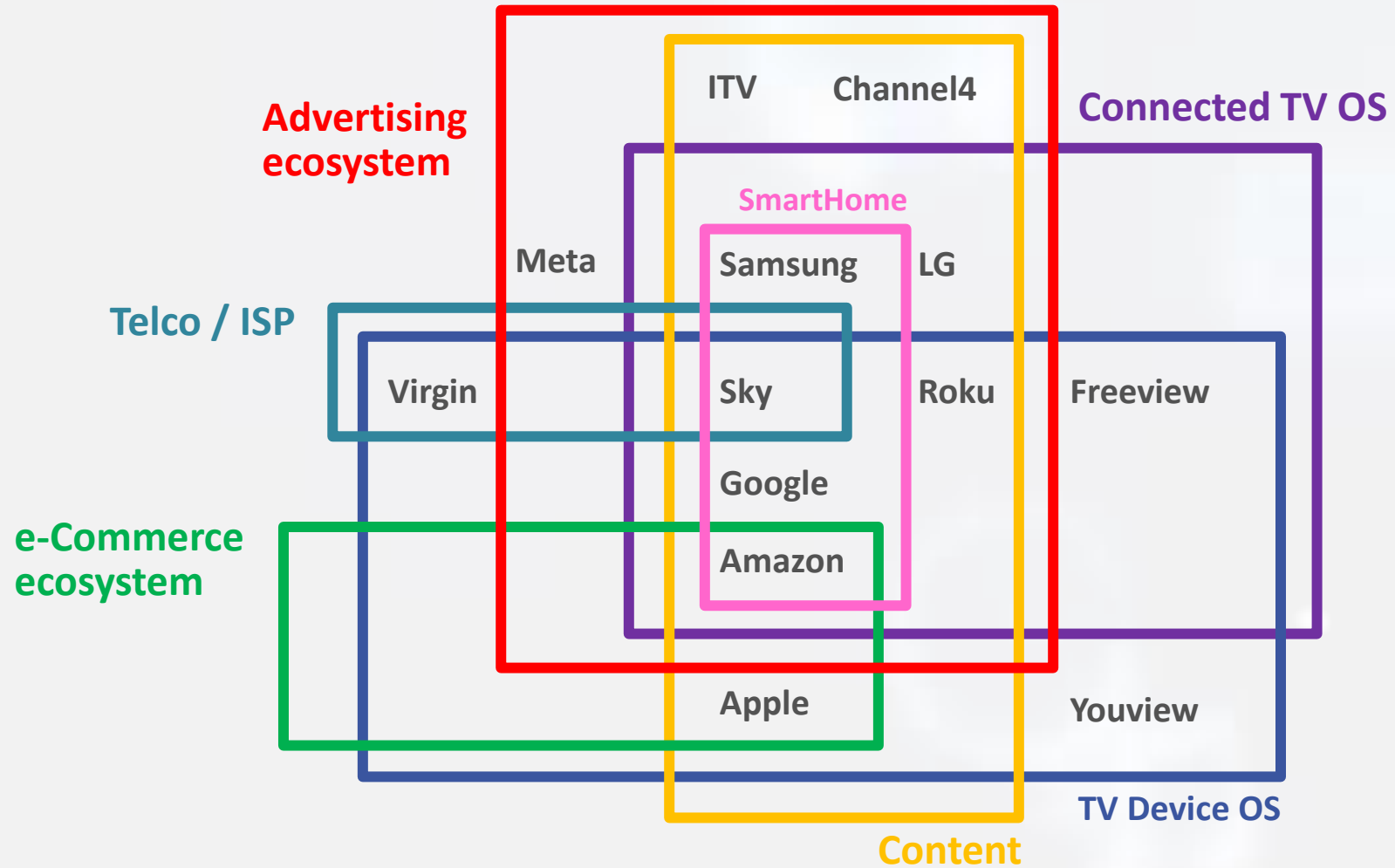
Managing Director - Decipher

Challenges In the Video Landscape
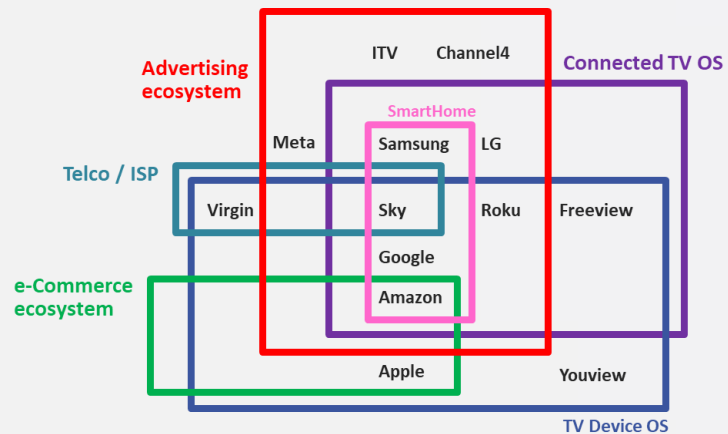
Defining 'the video landscape'?

Defining a viewer?

Competing verification cultures?

Emerging Capabilities – conflicting ecosystems

Advertising ecosystem

Connected TV OS

ITV   Channel4

SmartHome

Meta   Samsung   LG

Telco / ISP

Virgin   Sky   Roku   Freeview

Google

e-Commerce ecosystem

Amazon

Apple   Youview

TV Device OS

Content

Emerging Capabilities – conflicting approaches

Multiple video sources with a wide variety of data sources backing them up

Significant variation on what are the key data points and mechanisms for validating them

Significantly different attitudes to external / third party verification

But...data quality is at the core of all capabilities

Landscape Overview

TV DEVICE BRANDS

TV DATA SYSTEMS

TV OPERATING SYSTEMS

New Data Sets – from Connected TV

ACR
Connected TVs can include an **Automatic Content Recognition (ACR)** capability which allows an operator to monitor what is being viewed through the screen.

This can be done by 'audio matching' or 'video matching' against a database of programme assets. This covers linear channels and most catch-up programmes but not VOD only apps (like Netflix). Used by:

Server Logs
The VOD players and ad servers can report in a limited way against device IDs and user ID, however most are still targeting by attribute or cohort.

Used by apps that allow non-logged in viewing like:

Router Logs
Where a TV device is supplied by the provider of ISP services, and linked to its router, it is possible to monitor traffic and identify programmes and ads at the router.

Used by companies with ISPs: Sky, Virgin, Netgem partners. Used by:

Defining Data Quality - the criteria

Authentication vs inference

Multiple points of validation

Cross-platform measurement

Why Does This Matter?

Efficiency

Market Overview – Video competitors

Connected TV Overview – Decipher thoughts

Key Strengths

- Global proposition built on a device strategy that is morphing into a platform play

- Its global position enables global brand deals (mainly signed out of the US) that give its media team a foundation of activity in each market to build on

- Global capacity to support a media team with content deals based on supporting the global distribution of 2nd tier apps

- A global ad-tech build based on acquisition of key parts of the value chain

- Their dominance of smart TV sales means it can build functionality like FAST on its CTV platform and create a market standard.

Google Overview – Decipher thoughts

- Global, standardized approach to agencies and brands

- Control of three key stages of a global ad-tech stack (SSP, DSP and marketplace) as well as offering agency services to key brands

- Self-serve systems with massive support system and training networks

- Wide and deep 1st party data

- Control of pixel-based data gathering system

- Ownership of a key smart TV operating system and partnerships with 10 of the top 12 manufacturers

Amazon Overview – Decipher thoughts

- Global basis of its ad-tech and audience is attractive to global brands and agencies

- Number of logged-in accounts in the UK, driven by e-commerce, through which they are able to build detailed first party profiles

- Links to shopping behaviour and profiles within their own first party data

- Built in client base who use the e-commerce platform

Meta Overview – Decipher thoughts

- Global, standardized approach to agencies and brands

- Control of three key stages of a global ad-tech stack (SSP, DSP and marketplace)

- Self-serve AdManager systems with massive support system and training networks

- Wide and deep 1st party data

- Control of pixel-based data gathering system countering deprecation of cookies

Roku Overview – Decipher thoughts

- Roku's UK footprint is small, but its global reach gives it scale that is attractive to so some agencies and advertisers.

- It US derived capabilities are sophisticated but haven't cut through in the UK yet

- Roku runs its own DSP (they bought Dataxu) which currently offers inventory only on Roku devices – but is trying to open this to all connected TV inventory.

- Roku uses ACR across its screens and server logging via its 3rd party app partners.

ITV Overview – Decipher thoughts

- National brand and universal presence of its linear channels & apps drive volumes

- Being able to offer linear+ campaigns building off large linear audiences has underpinned digital weakness

- Catch up linked to linear broadcast, which drives a significant % of VOD use.

- They have a credible story for linking linear audiences with digital identities and also for working with advertiser first-party data.

'Watch Outs' for Advanced TV

AUDIENCES & ID

There is no 'TV vs Digital' and no audiences vs IDs. Bring both linear and addressable to bear in unified campaigns.

CONTENT STILL KING

Great TV campaigns need depth and variation of video content, connecting linear and VOD with display and commerce

AUDIENCES & ID	**CONTENT STILL KING**
QUALITY AND QUANTITY	**ALL THE PIECES**

QUALITY AND QUANTITY

Data at scale must build from data of quality with clear audiences and 1st party data coming together.

VALIDATION

Great campaigns connect linear and VOD with display and commerce.

Summary – Capability Perceptions

Legend:
- ITV
- 4Sales
- LG
- Samsung
- Google/YT
- Amazon
- Meta
- Sky Media

Categories:
- Audience Reach
- Content Depth/Variation
- Data Reach
- Data Quality
- Cross Media Ability
- Measurement

LOW — HIGH
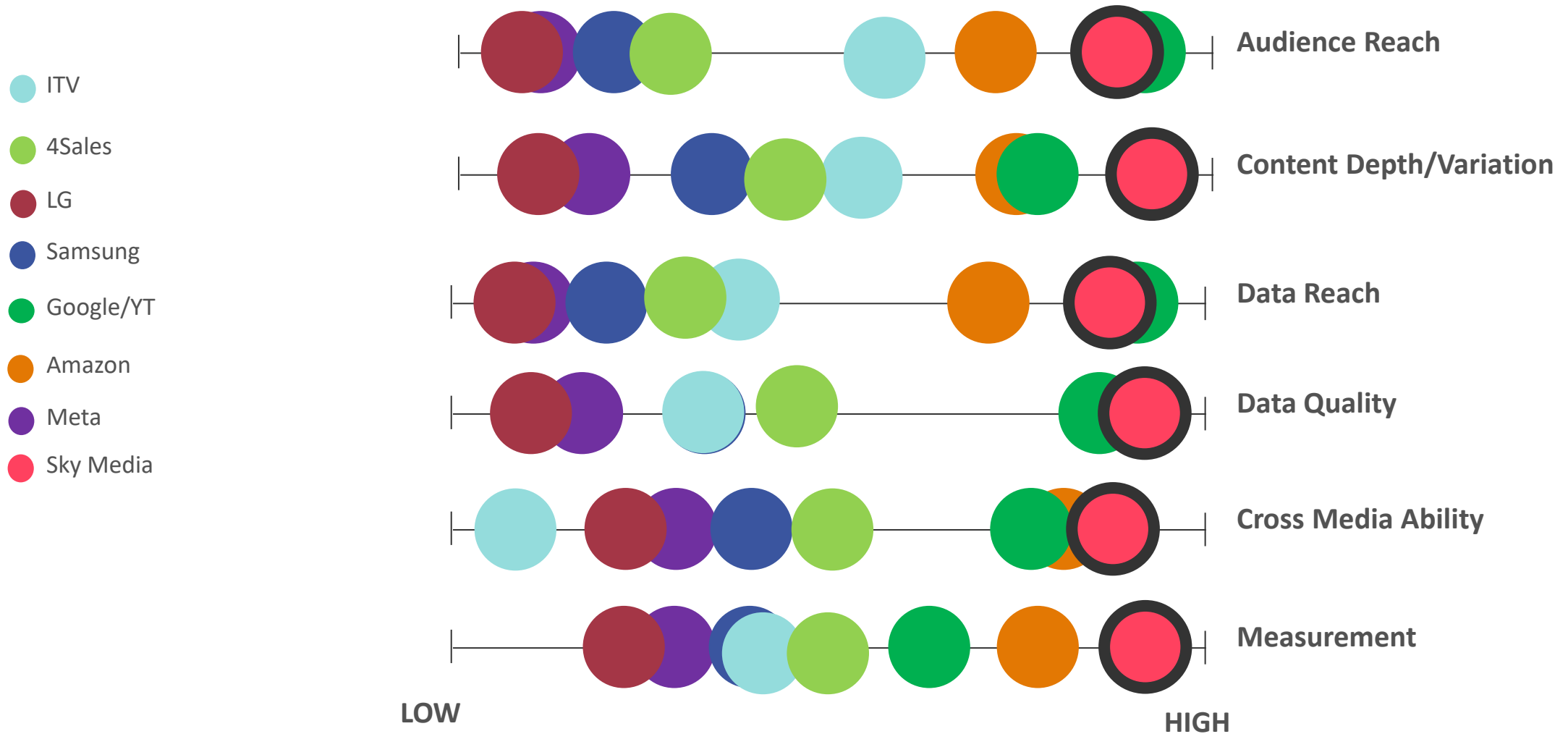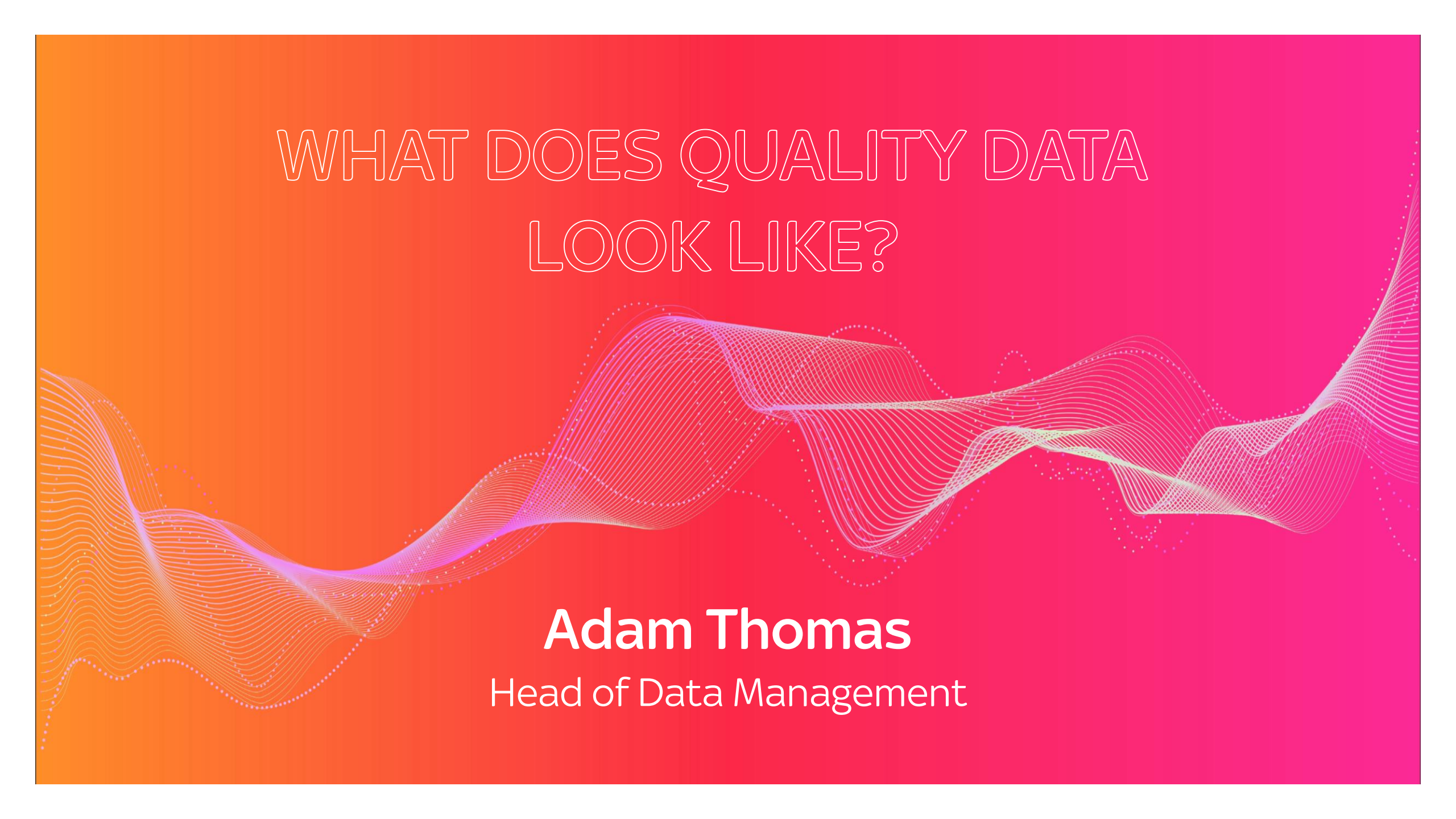
The Future? – three thoughts

From fragmentation to re-integration

Mechanisms for validation to improve

New data will come in to play

WHAT DOES QUALITY DATA LOOK LIKE?

Adam Thomas

Head of Data Management

Deterministic [dih-tur-m*uh*-**nis**-tik]

'Known, not assumed, guessed or modelled – directly connected'

Demystifying 'Deterministic' vs 'Probabilistic'

N.E.Body@Notmail
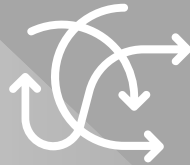
Assumed / Modelled

Claimed Surveys

Changing IP

Real Households

Direct Match

Actual Behaviour

Household IP Directory

Data
SC at ALE

Quality
———————
Scale
———————
Experience

sky nature

Data Clean Room [dey-t*uh* kleen room]

'An independent, secure way to collaborate, share and match information'

Solid Data
Foundations?

Easy to talk about, hard to do

What data are required?

- **Compliant** - clear legal basis, clear purpose, transparent and protect privacy

- **Minimise** – keep simple & ultra focussed

- **Accurate** – linked to *real* people
  - Up to date and updateable
  - Identifiable
  - Verified

How?

- **'Core' operational processes** – subscribers, viewing, campaign exposure, purchases

- **Partner audiences** – specific & relevant e.g. brand not category

- **Advertiser customers / prospects** – managed securely to Sky standards

- **Quality** – 'built in' & checked

4m

Household Panel

A Decade of Data from Sky

1,800
Evaluations

+30
Product Categories

2000+
Target Audiences

Multi-award Winning Methodology

The Fear Index

sky atlantic

Sky's Viewing Panel

Set Top Box
Every click from the set top box is collected overnight.

Data Collected
This viewing data is collected second by second across all channels including ITV and 4
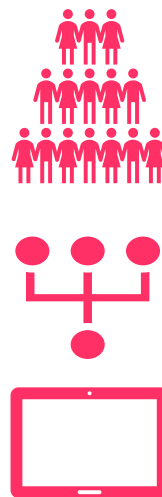
Mapping
The data is mapped to BARB spot data and impartially audited by RSMB
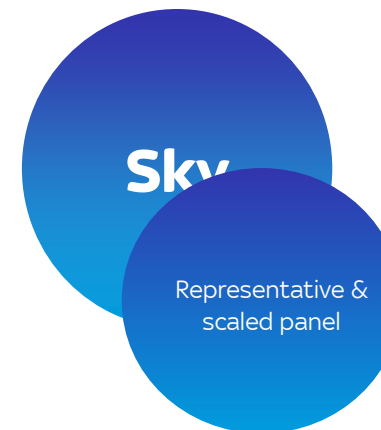
Matching
We can match at household (HHs) level with your own customer data or relevant third-party data sets.

Sky

Representative & scaled panel

CFlight [see-flahyt]

'Broadcaster capability to combine live and on demand TV measurement'

Same principles for data & measurement

- Transparent data sources

- Tied to authenticated users

- Largest possible datasets

- Open to industry collaboration

Linear

VoD

LIVE TV

ON DEMAND

CFlight™

x

Barb

Campaign
Performance
VoD + AdSmart

X2

TV is becoming more effective

R² = 0.7635
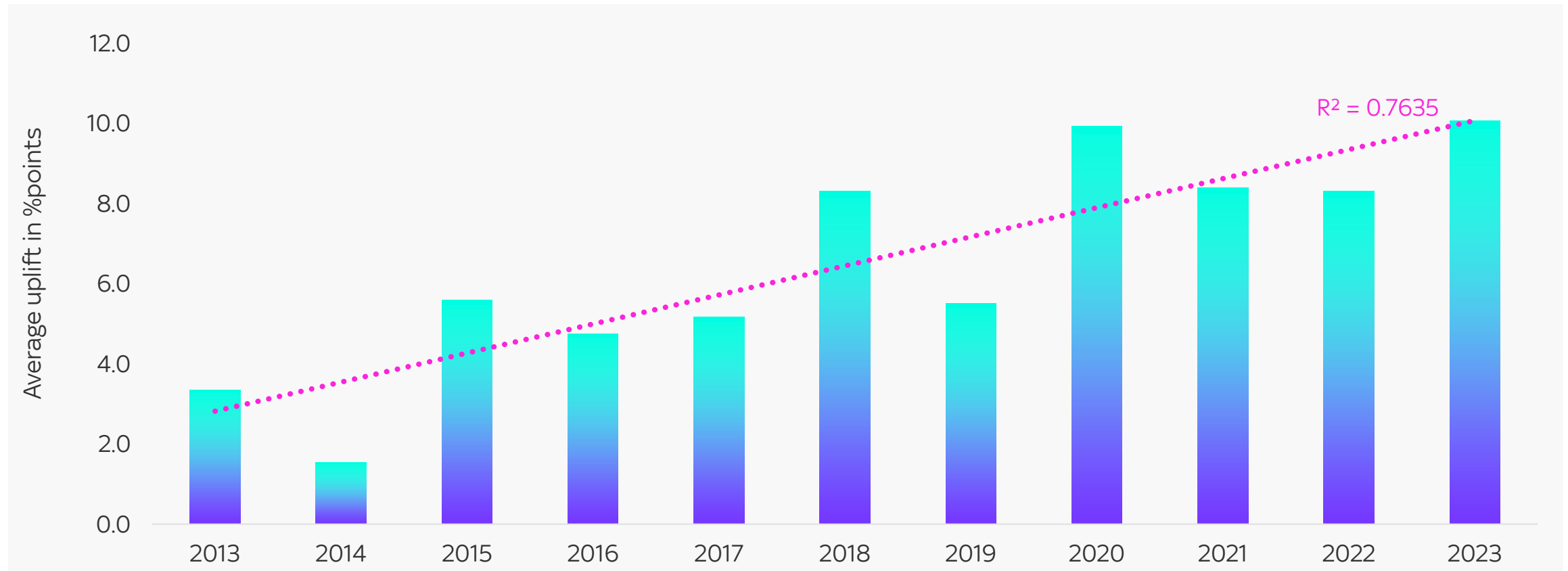
Digital IDs are now linked to customers viewing

- Adobe Device IDs linked to 90% of panel homes

- Gives us single source for digital linked to our customers

CFlight from Sky

Linear

LIVE TV

VoD

ON DEMAND

+

AdSmart

ADDRESSABLE

+

Digital

ONLINE
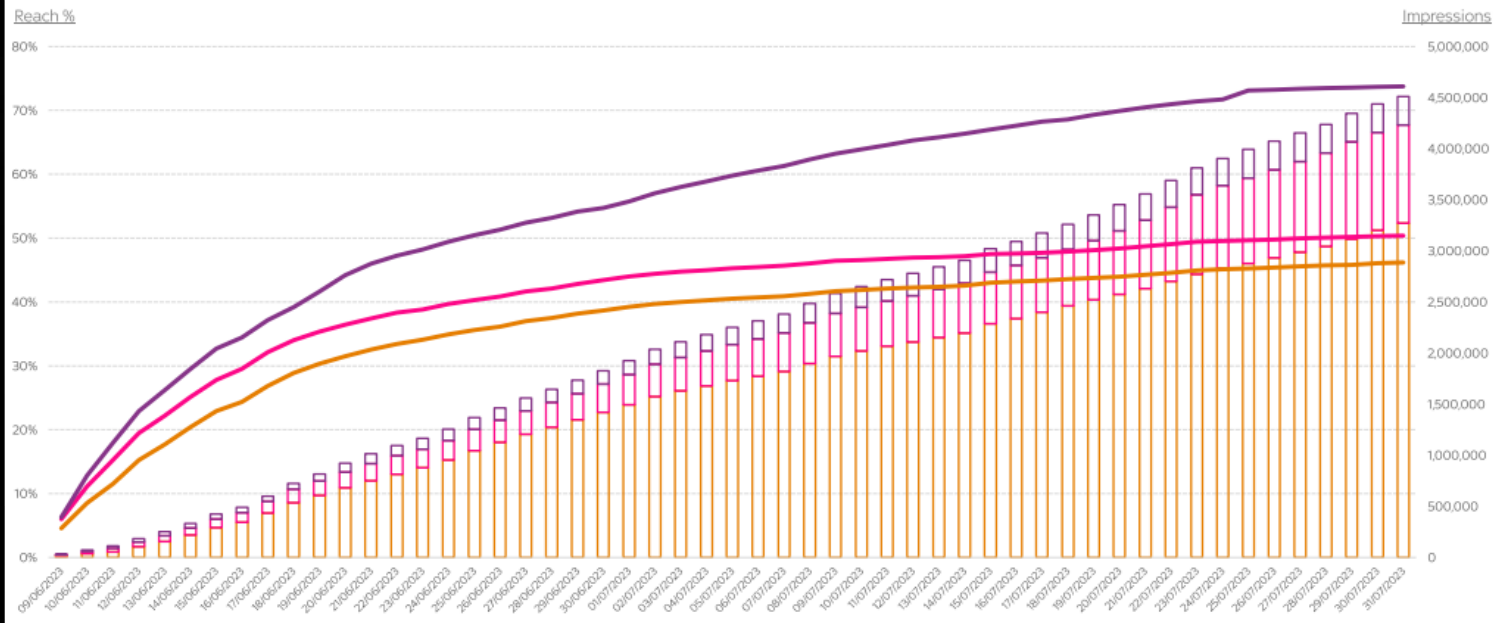
Data @ Sky Media

RICHER
Insight

SMARTER
Targeting

SHARPER
Measurement

Geo Targeting

Advanced Attribution

Relevance is Key

Geo-Targeting should not mean broad and indiscreet, but highly accurate and highly relevant
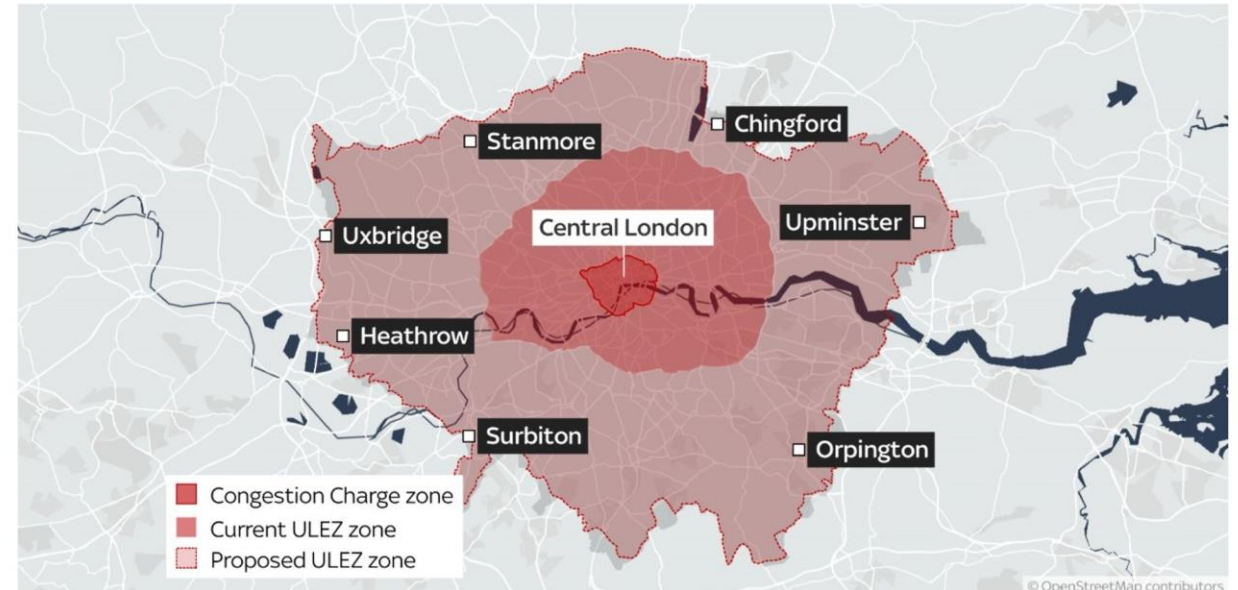
Qualified & Verified data enables hyper-precision and 'test & learn'
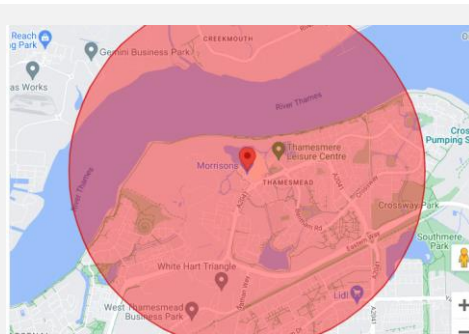

13 TV Regions

31 Metropolitan Areas
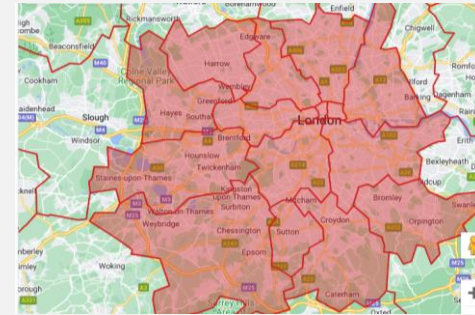
121 Postcode Areas
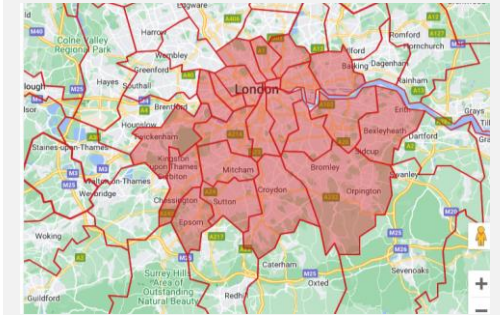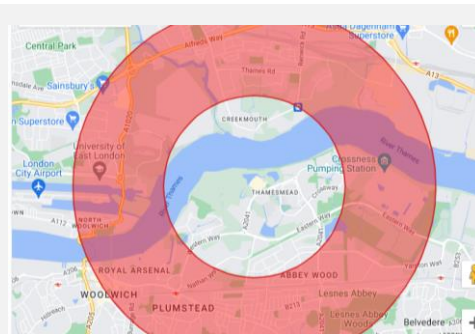
317 Local Authorities

Geo-Box

Radius

Doughnut
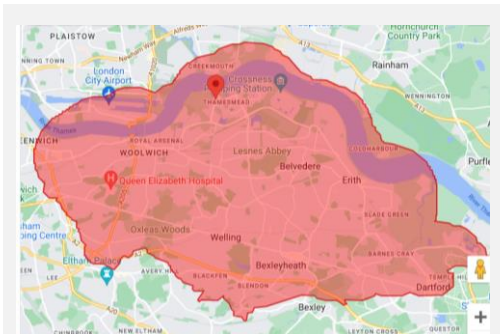
Drive Time

Geo-Targeting is 30% more effective than broad Geographic campaigns

+30%

SHARPER Measurement

FROM

☹

Looking for correlations
from when the spot aired & waiting
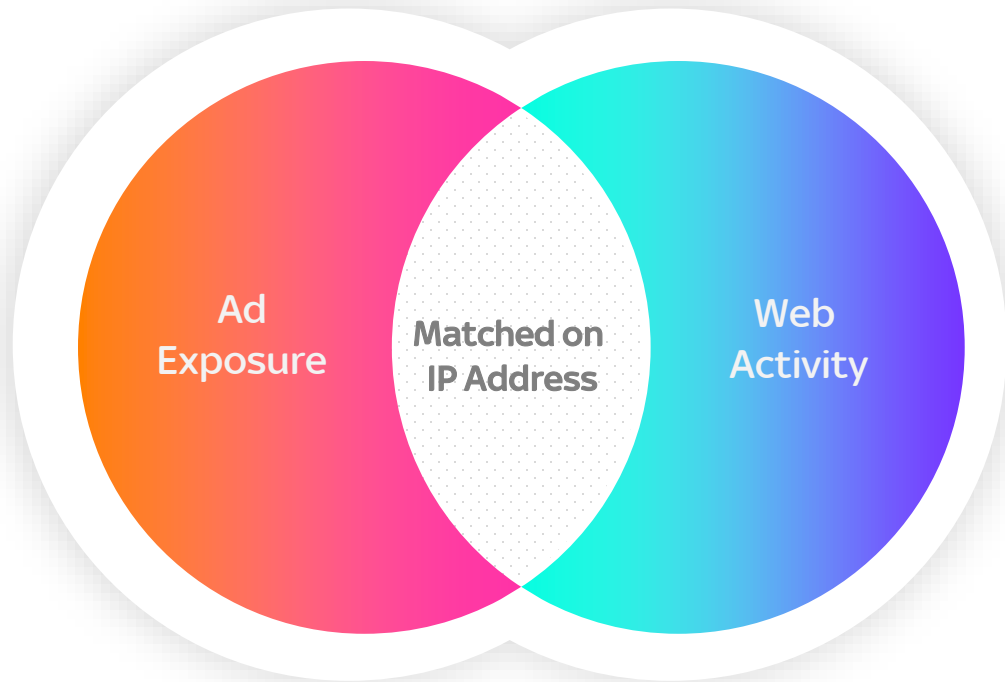for costly econometrics models

TO

☺

Direct data link from
tv, to website, to sales – expediting
decision making

Deterministic Web Attribution [Web a-tr*uh*-**byoo**-sh*uh*n]

'Ability to directly connect ad exposure
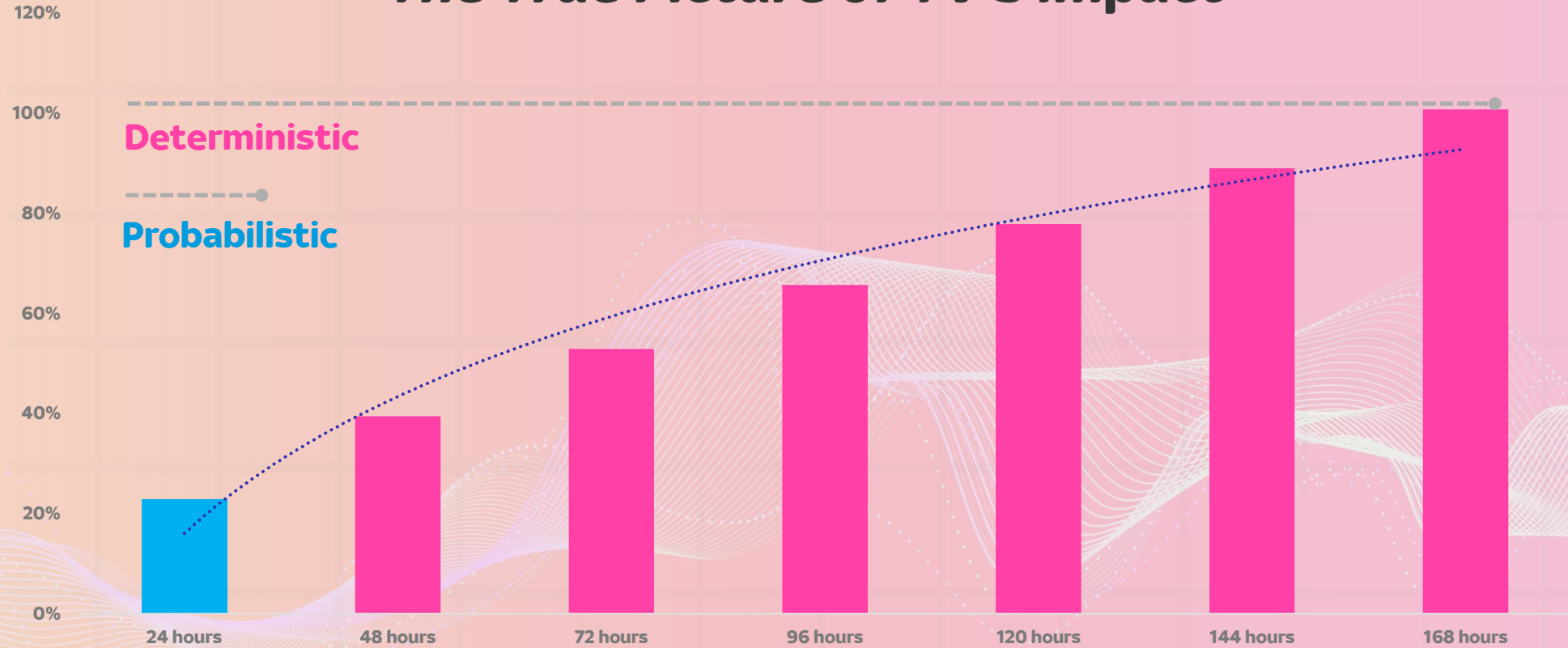and web activity'

Matching IP Addresses

Ad Exposure

Matched on IP Address

Web Activity

Deterministic Web Attribution captures
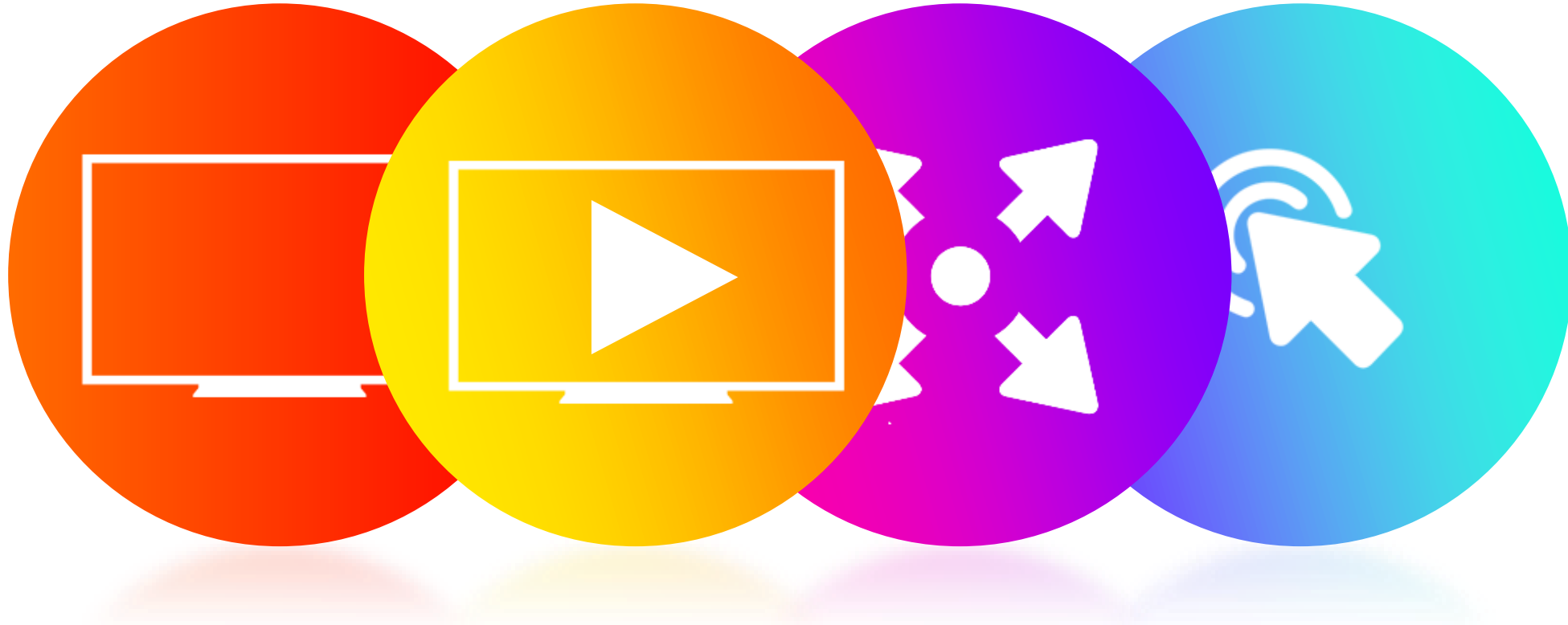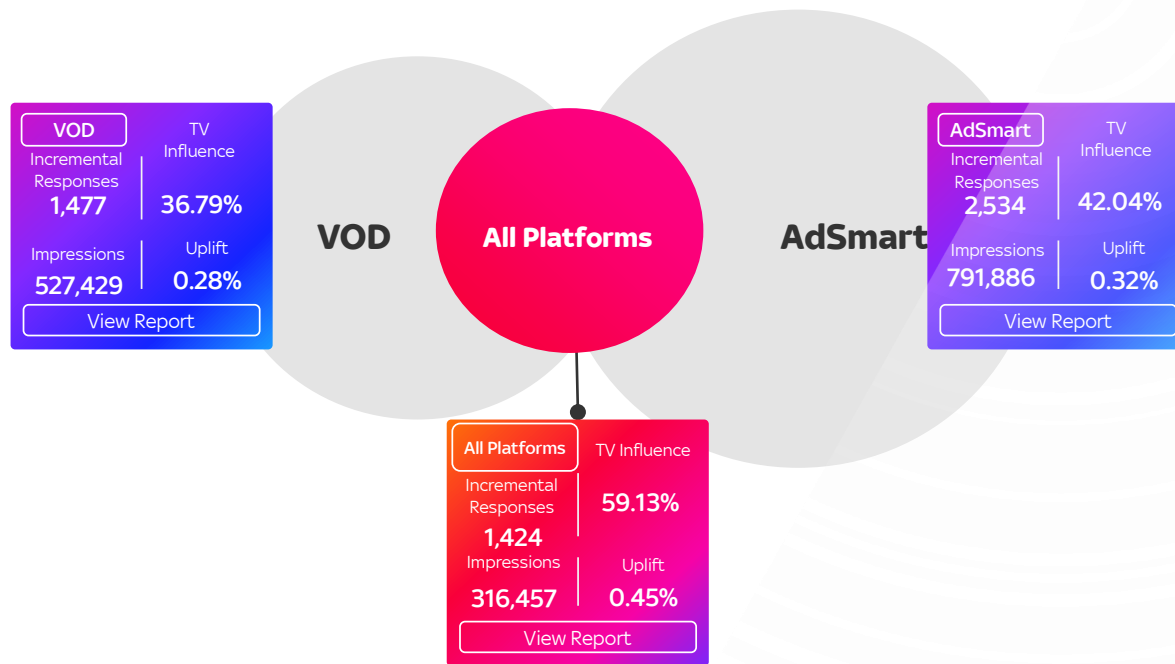
80%

previously uncaptured web visits

Cross Platform Web Attribution

UNIFIED ATTRIBUTION ACROSS **MULTIPLE** PLATFORMS

All campaigns. All the stats.

VOD

All Platforms

AdSmart

VOD
Incremental Responses
1,477

TV Influence
36.79%

Impressions
527,429

Uplift
0.28%

View Report

AdSmart
Incremental Responses
2,534

TV Influence
42.04%

Impressions
791,886

Uplift
0.32%

View Report

All Platforms
Incremental Responses
1,424

TV Influence
59.13%

Impressions
316,457

Uplift
0.45%

View Report

All Campaigns

Incremental Responses
5,435

Impressions
1,635,752

TV Influence
43.66%

Uplift
0.33%

View Report

DATA IN ACTION

Pierre Coppin
Deputy MD – Sky Mobile